

2026

Guide to Next.



Fight for
what's
~~possible~~

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Editor's Note

Every year, "Guide to Next" is our chance to take a clear-eyed look at what's coming. But this year, the stakes feel higher—the decisions heavier, the bets bigger. Leaders told us they're walking into 2026 with equal parts optimism and unease. The phrase that stuck with us was this: optimistic uncertainty.

That tension is real. Across Publicis Sapient's own industry surveys, the majority of executives say their AI technology and programs are scaled or enterprise ready. Yet our data, and the experts we spoke with, reveal a different story: most organizations are still in pilot mode.

Confidence is outpacing capability, and that gap has become the new fault line in enterprise AI. It's what our research calls decision debt: when optimism moves faster than evidence, and assumptions scale before systems do.

Here's where the cracks are starting to show, and the fights in front of every organization in 2026:

- **Originality vs. sameness.** If you let off-the-shelf AI dictate your choices, you'll look and sound like everyone else. Efficiency without distinctiveness is a race to the bottom.
- **Breakthrough vs. bottleneck.** Put agents to work to shorten delivery cycles, run tests and reimagine design. Then scale with intent, powered by data that's clean, connected and governed like the asset it is.
- **Decisions vs. deferrals.** Years of tech debt have piled up: old systems, deferred decisions, fragile fixes. Agentic AI won't cover those cracks; it will make them impossible to ignore.
- **Routine vs. reinvention.** Redefine roles. Put humans in the loop for judgment, ethics and context. Build systems that reflect who you are, not just what's cheapest or easiest.

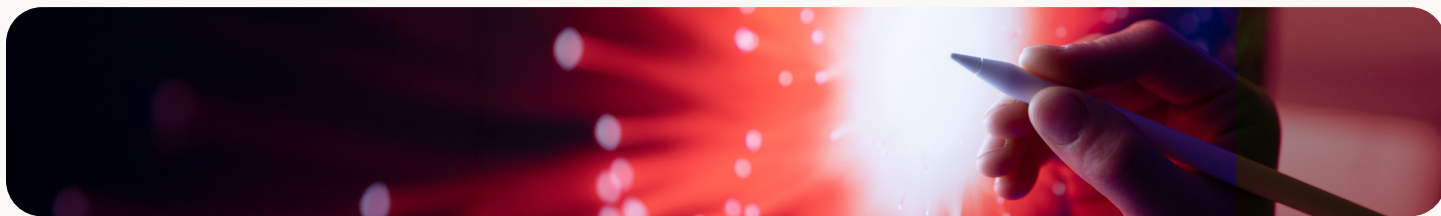
"Guide to Next 2026" is both a map and a mirror: a look at where markets are headed and a reflection of how ready leaders truly are. Across every sector we studied, ambition is high, but alignment still lags.

Winning now means closing that distance. It means turning confidence into capability, not just in what you build, but in how you govern, measure and lead. The bold moves ahead won't just be technological; they'll be structural, cultural and human.

Don't play it safe. Dare to prove your optimism right.

Your systems are already shaping your future. The only question is: are they fighting for you or against you?

-The Publicis Sapient Editorial Team



Guide to Next 2026:

Quick takes

Financial Services

A \$124 trillion wealth transfer is underway, and firms must shift from products to life-centered journeys.

Retail

AI will soon power every corner of retail, and success depends on encoding your brand identity.

Consumer Products

Buying decisions are moving to machines, and brands that fail to make their data readable will disappear.

Transportation & Mobility

Cars are becoming connected commerce platforms. The winners will design for real driver needs.

Healthcare

AI's biggest impact will come from fixing access, not diagnosis — starting with the invisible systems that delay care.

Energy & Commodities

The companies that win won't be those with the most assets, but those that decide fastest and best.

Telecom, Tech & Media

Audiences are fragmenting. Growth now depends on personalization, trust and smarter use of data.

Travel & Hospitality

Distribution is being rewritten by AI, influencers and digital identity. Attention is the new currency.

Words that will *define 2026*



Industry *Provocations*

Bold takes on every major sector



Fractured Audiences Push Telecommunications and Media to Redefine Reach

When your audiences shift, your strategies should, too.

QUICK TAKE

Audiences are scattered across new platforms and wary of how data is used.

Growth now depends on rebuilding personalization and trust through smarter use of AI and data.

Companies should focus on transparent value exchanges and personalized experiences that increase loyalty and revenue.

Why the old growth logic no longer works

Telcos and media (TMT) companies are at a crossroads. With fewer subscribers, more ways of consuming content and new opportunities, the ways in which audiences connect, and what they expect from you have fundamentally shifted. That's more than a distribution problem; it's a business model crisis. The old growth logic of focusing on just subscriber adds and impressions no longer works.

Your audience hasn't disappeared—they've stopped waiting for you. To win in 2026, you must compete in an algorithmic arena where trust and AI decide visibility.

Today's audiences are elusive

TMT can't take its subscribers and customers for granted. As an October 1, 2025, [MoffetNathanson report](#) pointed out, a demographic shift in the United States—fueled in part by new immigration policies and emigration patterns that could [contribute to net-negative migration in 2025](#)—means that telcos are fighting over a shallow customer pool that grows more stagnant by the year.

Meanwhile, media and sports aren't just losing audiences to competitors—they're losing them to platforms that were never in the media business at all. Both industries are seeing more fragmentation, as customers and fans seek content on a seemingly endless catalog of new platforms, such as TikTok, Instagram Reels and immersive gaming ecosystems such as Fortnite, which has [110 million active users](#) every month. The captive viewer is gone; audiences are everywhere and nowhere at once.

So, how can you follow, find and monetize your customers when they keep shifting?

The new playbook is all about data and AI

What new strategies will position you well for 2026 and beyond? Data and AI can arm you with the insights you need to make the most of the audiences that you have.

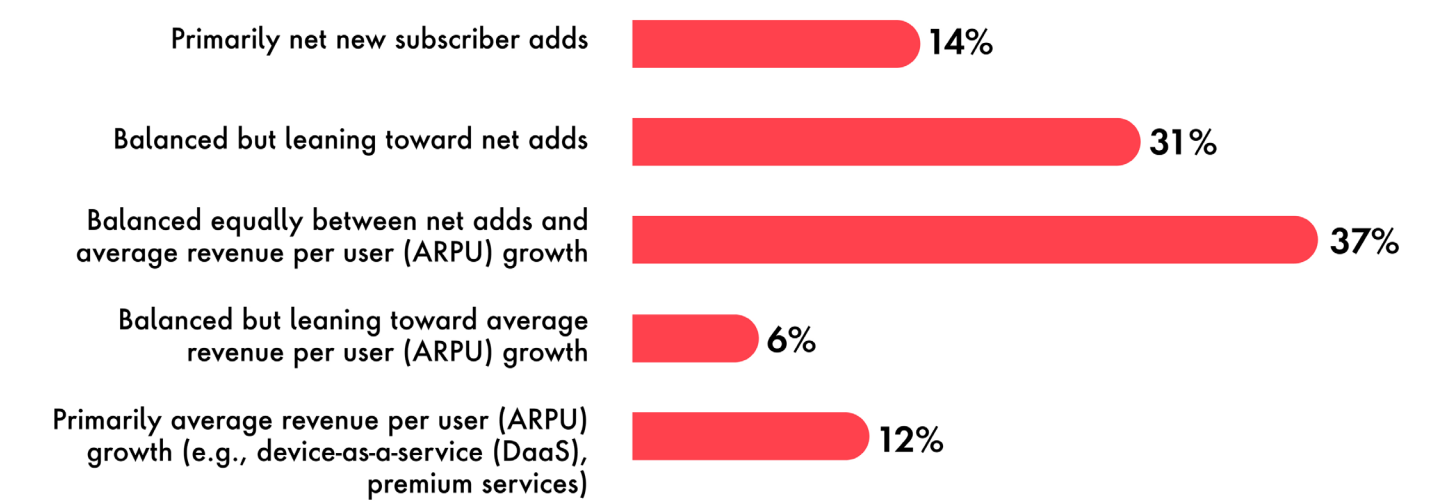
Flat growth makes ARPU all the more urgent for telcos

Today's telcos face a sobering reality: [Everyone has a phone with a long shelf life](#). How can telcos grow? Expanding your market share is not enough. Instead, drive up the average revenue per user (ARPU) through value-added services, such as gaming or streaming packages, to get more value from your customers. The market for these services could exceed [\\$530 billion by 2030](#), up from \$223 billion in 2024. Publicis Sapient's 2025 Telecommunications & Media Research found that 18 percent of telcos are leaning toward or focusing exclusively on ARPU growth and only 14 percent are focused purely on net adds—the beginnings of a tectonic shift in how telcos are strategizing for future growth. The imperative is clear: Lead the wave or get left behind [Figure 1].

 **Figure 1**

The growth equation has flipped
Subscriber-led expansion is giving way to ARPU-driven strategies—telcos are redefining growth around value, not volume.

Shifts in Revenue Growth Strategy Emphasis Over the Past Three Years



Publicis Sapient’s 2025 Guide to Next Telecommunications Research Q. Over the past three years, how has your revenue growth strategy shifted in emphasis? N=86 (Telecommunications leaders).

Want consent to use data? Build trust

Telcos and media are drowning in data. The real challenge is getting the right to use data—and that’s a trust issue. [Insights from Customer Loyalty Research](#) found that 80 percent of respondents in France, Germany, the United Kingdom and the U.S. were concerned about companies using their data. That means they may be less inclined to share it, a reality that would leave you with fewer insights. Publicis Sapient’s 2025 Telecommunications & Media Research found that executives mirror these concerns, with 52 percent of execs in media and 48 percent in telco cite regulatory and privacy risk as their top barrier to adopting AI more broadly.

This trust deficit could have an echo effect, since you need the right kind of data to better serve your customers and create new services for them. Indeed, many telcos are already facing this challenge, since 61 percent of telcos leaders believe data debt is “extremely” or “very” impactful in delaying or blocking customer experience innovation.

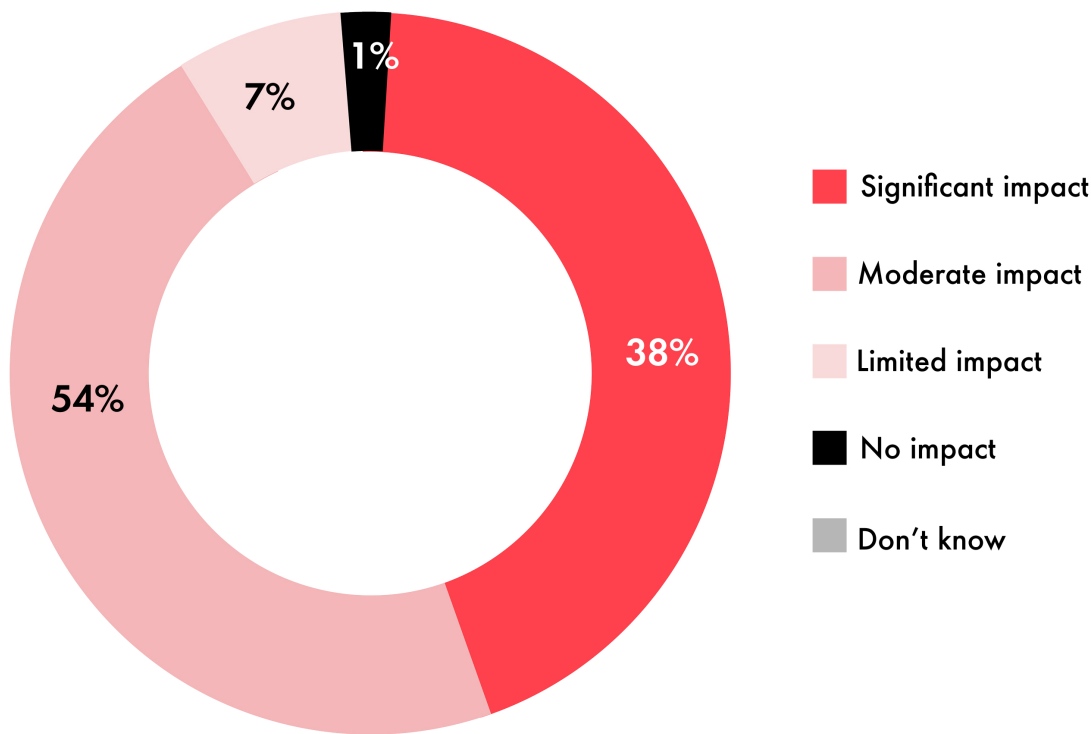
How can TMT incentivize customer consent? Progressive consent embeds privacy consent into the digital experience. “If you build the right compelling user experience, people will give you the right to use the data. They just need to understand the value proposition,” says Ray Velez, EVP & Chief Technology Officer for Customer Data Solutions.

That means communicating a clear value exchange by giving customers access to exclusive content, discounts or other incentives, such as a beauty retailer [giving customers access to an AR try-on feature](#). Publicis Sapient’s 2025 Telecommunications & Media Research shows that 92 percent of media leaders expect progressive consent to have a moderate to significant impact on trust and data sharing [Figure 2].

 **Figure 2**

Progressive consent becomes a catalyst for trust
Most media and advertising leaders believe embedded consent mechanisms will strengthen relationships given the vast majority (92 percent) expect moderate to significant business impact on customer trust and data sharing within three years, signaling privacy is evolving from compliance to competitive advantage.

Expected Business Impact of Progressive Consent Mechanisms on Trust and Data Sharing



Publicis Sapient’s 2025 Guide to Next Media Research. Q. What level of business impact do you expect progressive consent mechanisms (embedded into the user experience) will have on customer trust and data sharing in the next three years? N=91 (Media & Advertising leaders).

Personalization is the new gold standard

Telcos and media companies have long struggled with true personalization. Simply offering five different plans or the same five commercials isn't personalization. You need to tailor offers, products, services and relevant ads to the individual customer.



“AI is here to help. Targeting individuals and hyper-personalization was not possible to the same level without having this AI that we’re now witnessing.”

Vlad Panov
VP of Engineering

As telcos reconsider their strategies in the AI era, media networks—which some abandoned after early setbacks in the early 2010s—are ripe for renewed exploration. This evolution is crucial as these networks move from the traditional world of linear advertising to a more dynamic, data-driven model that will help telcos and media companies alike redefine their approach to audience engagement and revenue generation.

Media networks apply what Velez calls the “web’s best personalization model” to engage customers and increase revenue. Though retailers have led the way in adopting media networks—Walmart’s network is responsible for [12 percent of all the company’s profits](#)—both telco and media companies can stand to benefit too. Publicis Sapient’s 2025 Telecommunications & Media Research shows businesses employing media networks are seeing results, with nearly four out of five (79 percent) media executives seeing “high” or “moderate” ROI.

How can you ensure a high ROI? Media networks are most impactful when they’re relevant, such as ads for charging cables on a phone bill or noise-canceling headphones for customers streaming content from an airport. This approach leads to better engagement and satisfaction because customers see them as helpful rather than intrusive.

You need clean data to build a successful media network, and by launching your own cleanroom—something that NBCU, Disney and Warner Brothers Discovery have already done—you can allow advertisers to collaborate securely with your media network. This collaboration closes a long-standing gap: the inability to link media spend to real commercial outcomes. Instead of measuring campaigns against impressions, reach or click-throughs, cleanrooms make it possible to tie ad exposure directly to transactions and adjust your campaigns in real-time.

Media's next monetization test is the changing ad landscape

Advertising has been at the heart of the media landscape, with [72.4 percent of all TV viewing coming from platforms with ads](#). But here's the rub: Viewers are often served up ads that are irrelevant. A recent survey from Tubi found that [63 percent of respondents](#) cited "irrelevant ads" as a point of frustration.

Agentic AI will automate this process by connecting audiences to the right ads.



"Agentic AI is the next generation of programmatic advertising and will be more sophisticated by reducing human error."

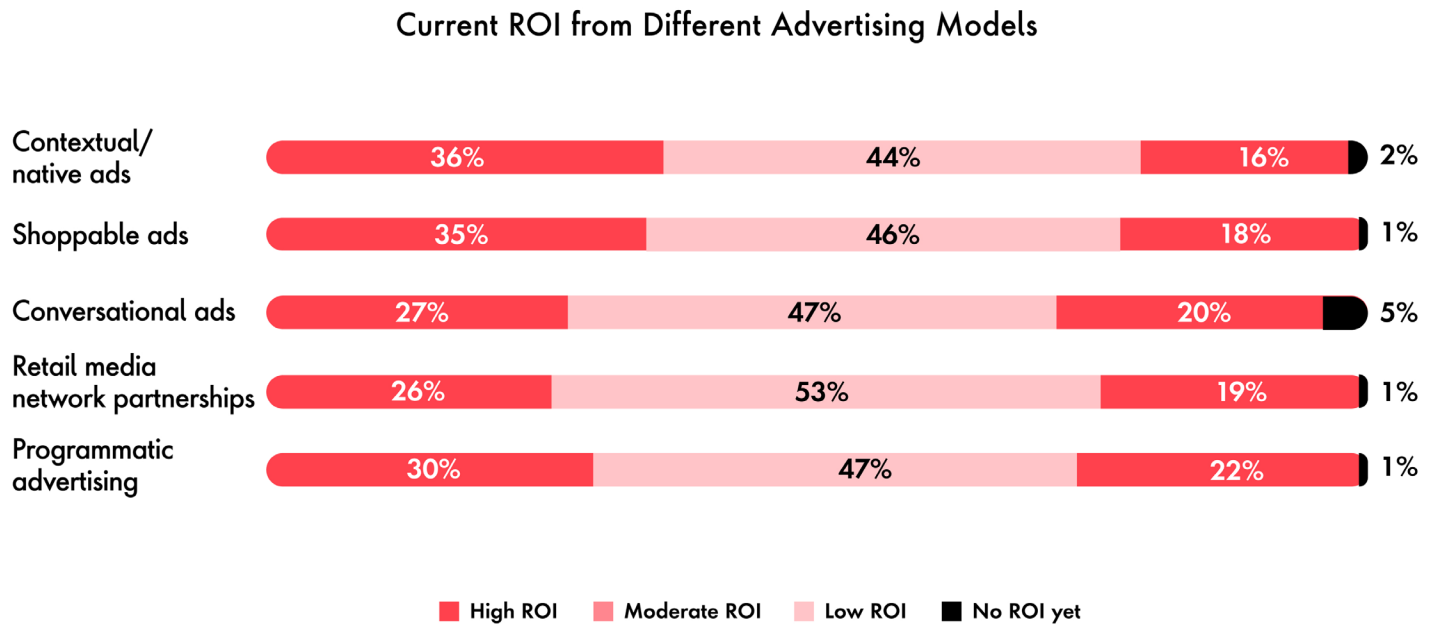
Steve Ehrlich

Vice President of Business Development for Telco, Media & Technology

Conversational ads and shoppable ads, powered by AI, are also on the rise, blending tech with human interaction to personalize experiences and help customers find what they're looking for in new ways. And media executives have high hopes for them—according to Publicis Sapient's 2025 Telecommunications & Media Research, 81 percent are seeing "high" or "moderate" ROI from shoppable ads, and 74 percent are seeing the same from conversational ads [Figure 3].

Figure 3

ROI of ad models remains uneven
Most media companies see strong ROI from contextual (80 percent) and shoppable ads (81 percent), while conversational ads lag with lower returns and higher risk. This confirms that in a fragmented audience landscape, media players must prioritize proven formats for revenue while carefully testing emerging ones, with AI as the differentiator for consistency in the future.



Publicis Sapient’s 2025 Guide to Next Media Research. Q. What ROI do you see today from each of the following ad models? N=91 (Media & Advertising leaders).

Evolution is existential

The pace of change for telcos and media isn’t slowing down—it’s only accelerating. The message couldn’t be clearer: TMT needs to embrace new strategies or risk becoming relics. Data and AI aren’t just tools but lifelines. Adapt swiftly, innovate audaciously and reimagine relentlessly because playing it safe is the riskiest move of all.

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End of article

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Research Methodology



This report is based on internal qualitative interviews and a quantitative survey conducted by IPSOS in September 2025, spanning five industries: Consumer Products, Retail, Transportation & Mobility, Telecommunications, and Media. The study captured insights from nearly 70 Publicis Sapient strategy, product, engineering, customer experience, data and AI experts who participated in 30-minute in-depth interviews and 540 senior decision-makers in digital transformation across seven markets: the United States, United Kingdom, Germany, France, China, Australia, and Italy. Markets were selected for their leadership in shaping global industry standards and innovation.

Industry	Total	US	UK	Germany	France	China	Australia	Italy
Transport & Mobility	89	23	20	15	16	0	0	15
Media industry	91	20	15	17	17	0	22	0
Telecom industry	86	20	18	17	16	0	16	0
Retail	157	32	32	31	32	0	30	0
CPG	157	31	34	31	30	31	0	0
Total	540	126	119	111	111	31	67	15

Respondents were C-Suite leaders or direct reports with recognized expertise and decision-making authority. They represented functions including executive leadership, IT, marketing, customer experience, operations, procurement and supply chain, strategy and transformation (including AI), finance, innovation and R&D, data and analytics, and engineering. Eligibility required a senior management role (minimum one year in position) at organizations with revenues of \$1B+ and workforces of 1,000+. All participants had direct responsibility for, or influence over, selecting external consultants and service providers for digital transformation.

Fieldwork was conducted via secure, self-completed online questionnaires in local languages, adhering to market research guidelines, confidentiality, and data protection standards. Results were analyzed at industry and total levels, with significance testing at the 95% confidence interval to identify meaningful differences.

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To compete, businesses must translate a customer-first strategy into practice. We enable this through long-term profitable growth anchored in customer acquisition, loyalty and value. We create innovative, data-informed moments that drive new customers to your brand and enhance the employee experience. From monetizing customer data to building innovative customer journeys, we nurture value-based relationships that power loyalty and profitability alike, reducing friction points and turning customer support into a value center.

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